Service Accent

SMS & Email Notifications

Setup & User Guide

2014

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chapter 1

Introduction

Welcome to the Service Accent SMS & Email Notifications Setup and User guide.

This chapter contains the following topics:

- Overview of notifications
- The Service Accent Document Set
- About this Guide
- Documentation Conventions
- Contacting Your Support Provider

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Overview of notifications

The notifications module is a software solution that is designed to work as part of Service Accent, Remote Customer, Remote Engineer, Mobile and Wireless. It allows SMS and email messages to be sent to your engineers, customers or named individuals, based on certain triggers.

When an outgoing message is generated from Service Accent, the message is either sent by email or by the internet to Clickatell (if SMS notifications are selected) and this is then distributed to the destination specified in the original message.

To enable you with SMS messaging, Vantage Computing International (VCI) has teamed up with Clickatell, a company that specialises in SMS technology.

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The Service Accent Document Set

The Service Accent document set consists of the following guides:

- **Service Accent Installation And Setup Guide** – this document describes how to install and configure Service Accent.
- **Service Accent User Guide** – this document describes how to use Service Accent.
- **Service Accent Online Meter Billing Setup & User Guide** - this document describes how to configure and use Service Accent Online Meter Billing.
- **Service Accent Sage Live Link** - this document describes how to configure and use Service Accent Sage Live Link.
- **Service Accent Dynamic Mapping** - this document describes how to configure and use Service Accent Dynamic Mapping.
- **Service Accent Remote Monitoring & Billing** - this document describes how to configure and use Service Accent Remote Monitoring & Billing.
- **Service Accent Remote Console Installation & Setup Guide** - this document describes how to install and setp the Service Accent Remote Console module.
- **Service Accent Wireless Setup Guide** - this document describes how to install and setup Service Accent Wireless.
- **Service Accent Wireless User Guide** - this document describes how to use Service Accent Wireless.
- **Service Accent Mobile User Guide** - this document describes how to use Service Accent Mobile.
- **Service Accent Remote Customer User Guide** - this document describes how to use Service Accent Remote Customer.
- **Service Accent Remote Engineer User Guide** - this document describes how to use Service Accent Remote Engineer.
- **Service Accent Remote Email Setup & User Guide** - this document describes how to configure and use Service Accent Remote Email.
- **Service Accent Messaging Setup & User Guide** - this document describes how to configure and use Service Accent Messaging.
- **Service Accent SMS & Email Notifications Setup & User Guide** - this document describes how to use Service Accent SMS & Email Notifications.

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About this Guide

This guide consists of the following chapters:

- **Chapter 1: Introduction** – an overview of SMS and Email notifications, documentation conventions, and Vantage Computing contact information.
- **Chapter 2: How to manage your SMS account** - details on how to manage your SMS account.
- **Chapter 3: Setting up your SMS and email notifications** - details on how to setup SMS and email message notifications from Service Accent.

Documentation Conventions

The following icons highlight particular sections.

Caution – failure to observe the caution described in this section may prevent Service Accent SMS & Email Notifications from operating properly.

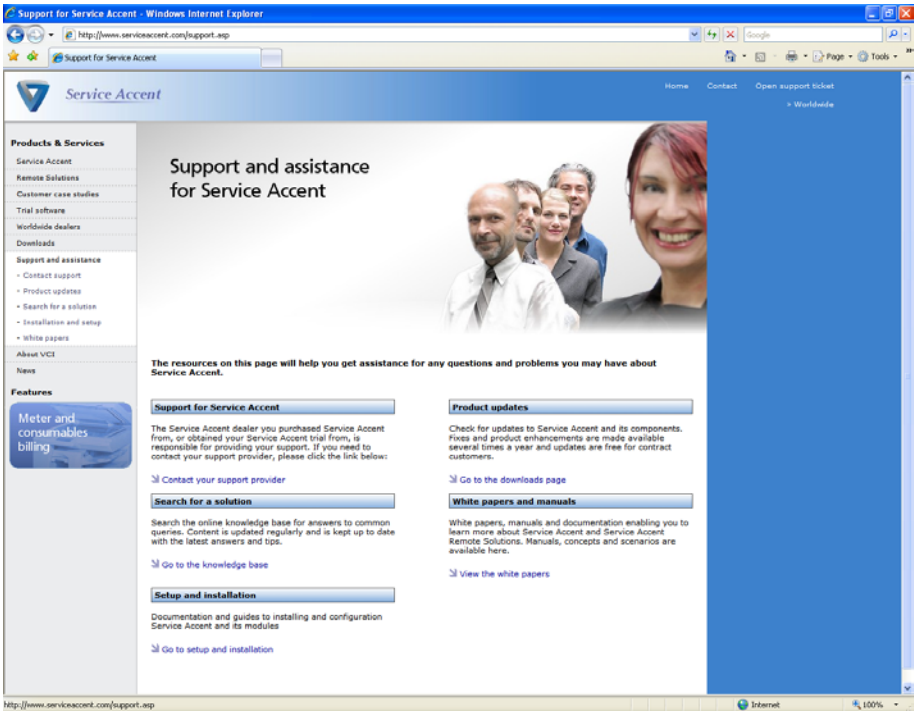
Note – sections highlighted with this icon contain pertinent information, such as exceptions to the preceding steps or sections.

Hint – sections highlighted with this icon contain hints or suggestions.

Contacting Your Support Provider

Web site:www.serviceaccent.com, click on **support and assistance**

Telephone and **Email** details will be provided by your support provider.



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chapter 2

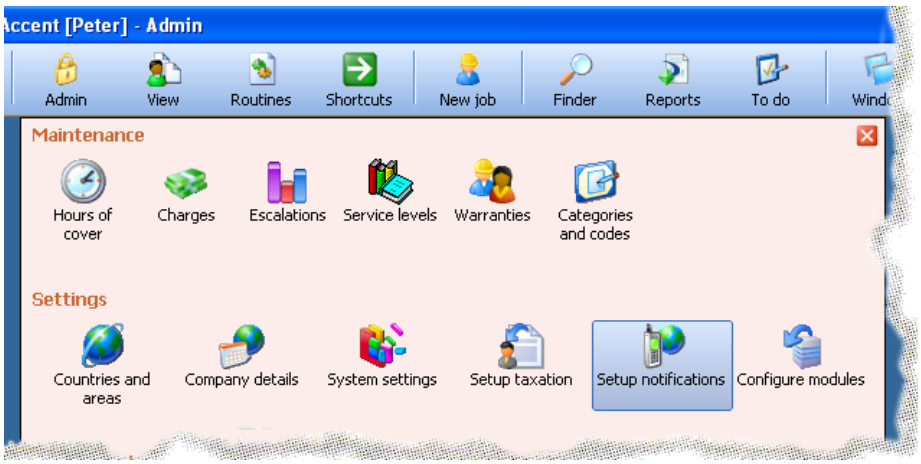
Setting up SMS and email notifications

You need to have purchased and activated Service Accent Notifications module before using Notifications. Also if Notifications are to be used with Service Accent Remote solutions, the applicable module must be licensed.

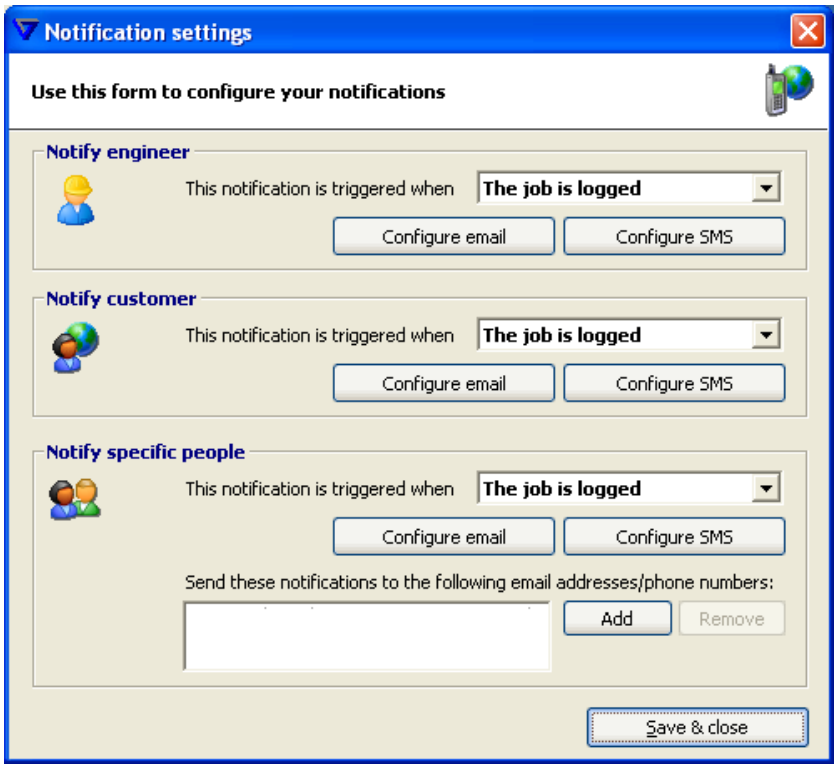
Enabling notifications

To enable SMS and Email notifications

1. Click **Admin** from the Service Accent button bar, under **Settings**, click the **Setup notifications** icon.



2. The **Notifications settings** dialogue is displayed



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3. In the **Notify engineer** and/or **Notify customer** and/or **Notify specific people**, select when the notification is triggered from the drop-down list. The default is **The job is logged**.

4. SMS & Email notifications can be setup for the following triggers

   - **The job is logged** - when the job is logged
   - **The job is provisionally issued** - when the job is provisionally assigned to an engineer.
   - **The job is issued** - when the job is fully assigned to an engineer.
   - **The job is put on hold** - when the job is put on hold.
   - **The job is taken off hold** - when the job is taken off hold.
   - **The job is closed** - when the job is closed.

The following pages explain how to configure Email notification (see page 7) and SMS notifications (see page 11).

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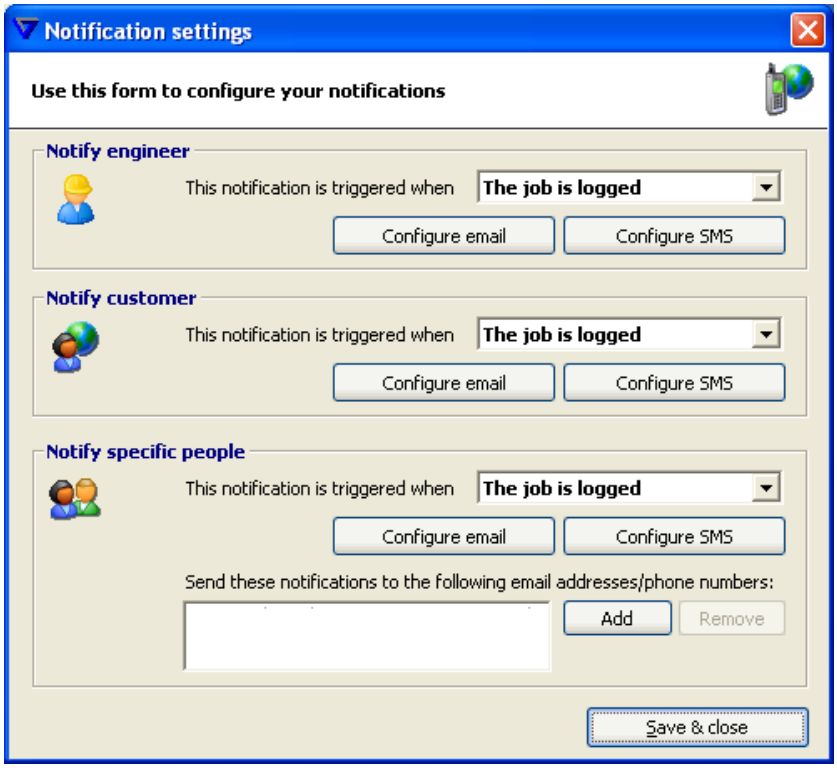
Configuring email notifications

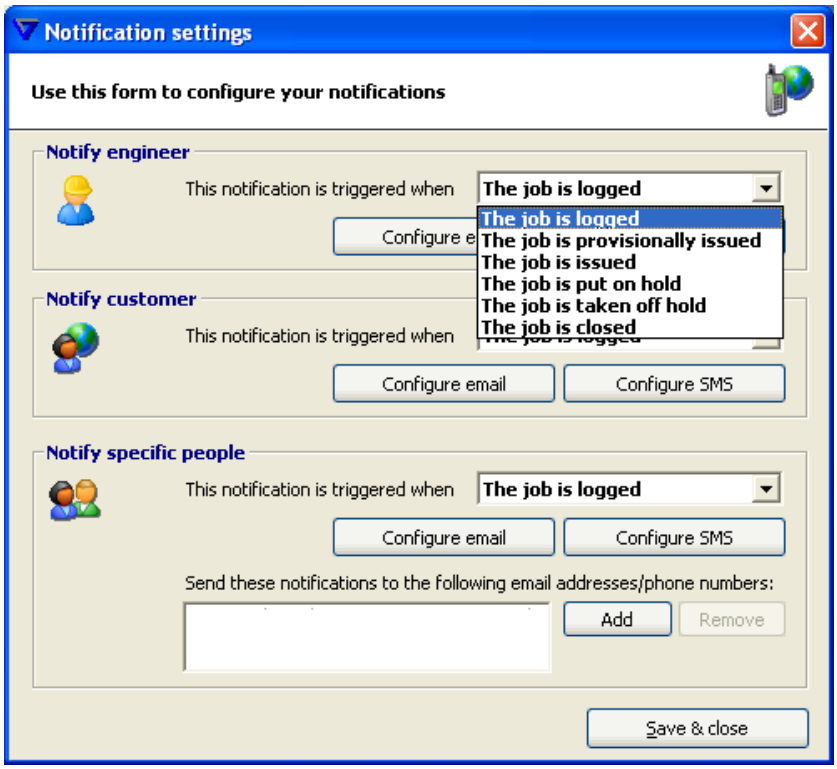
Before email notifications can be used, they need to be configured. Different email templates can be setup for the engineer, customer or specific people. The instructions below describes how to do this.

To configure email notifications

1. From the **Notifications settings** dialogue,



2. From the **This Notification is triggered when** drop down list, select the notification that will trigger the email.



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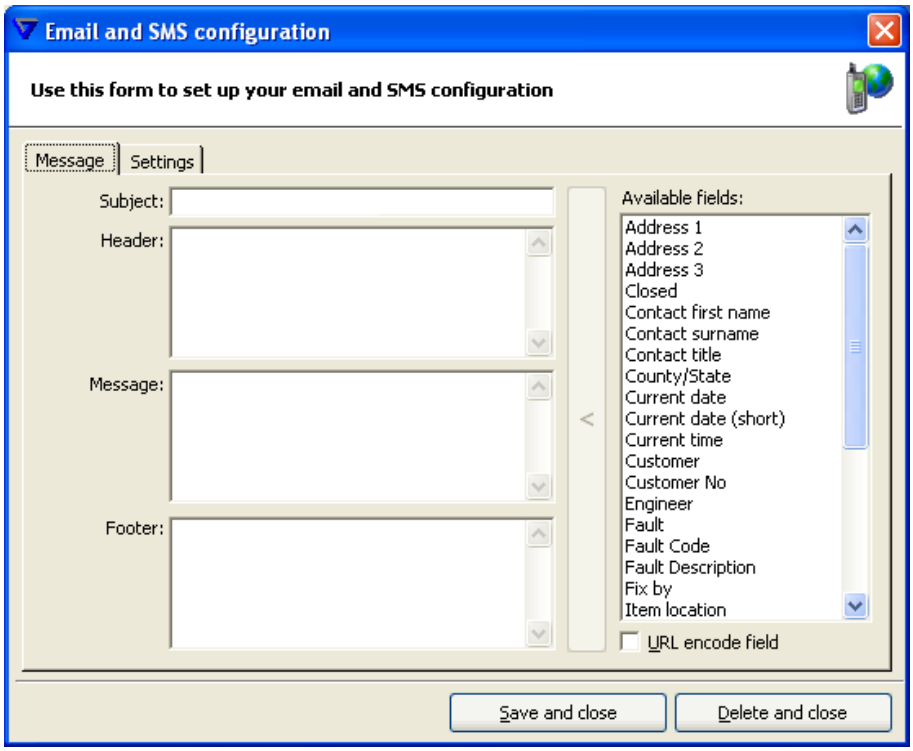
3. Click **Configure email**. The **Email and SMS configuration** dialogue appears;



4. In the **Subject** field, enter a meaningful subject for the email.

5. In the **Header** area, enter any headers that are required on the email.

6. In the **Available fields** list, highlight the Service Accent fields that is to appear in the email, and then click the arrow key to move it to the **Message** field.

   To remove a field from **Message**, highlight and delete it as you would any text.

   You can add text to the message, such as titles for the fields you select.

7. Enable **URL encode field** to activate the ability to put a URL (or hyperlink) in the message area.

8. In the **Footer** area, enter any footers that are required on the email.

9. Click the **Settings** tab

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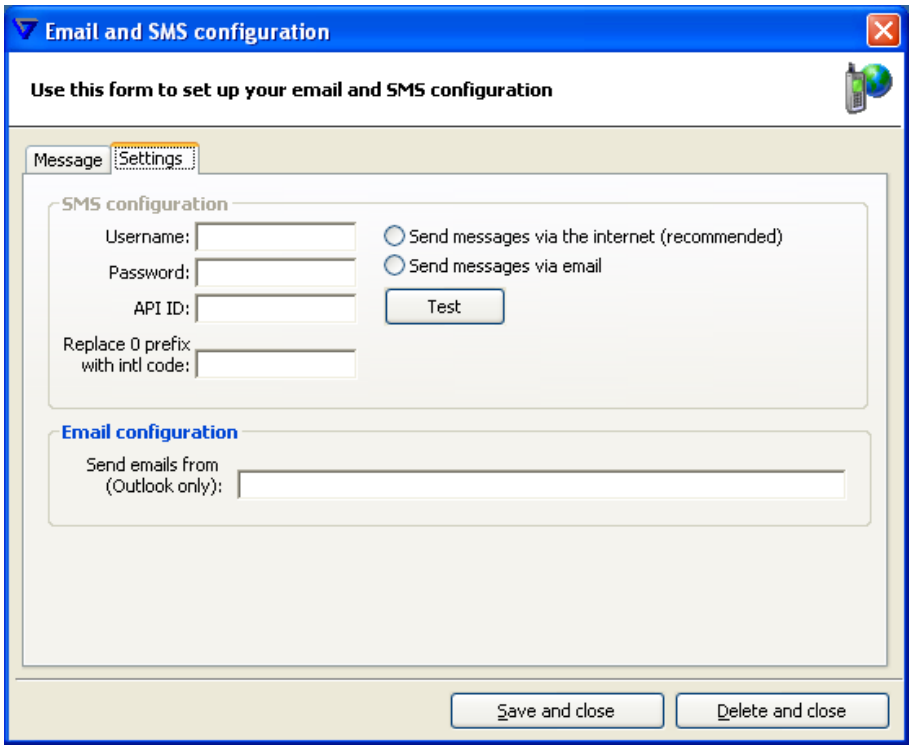
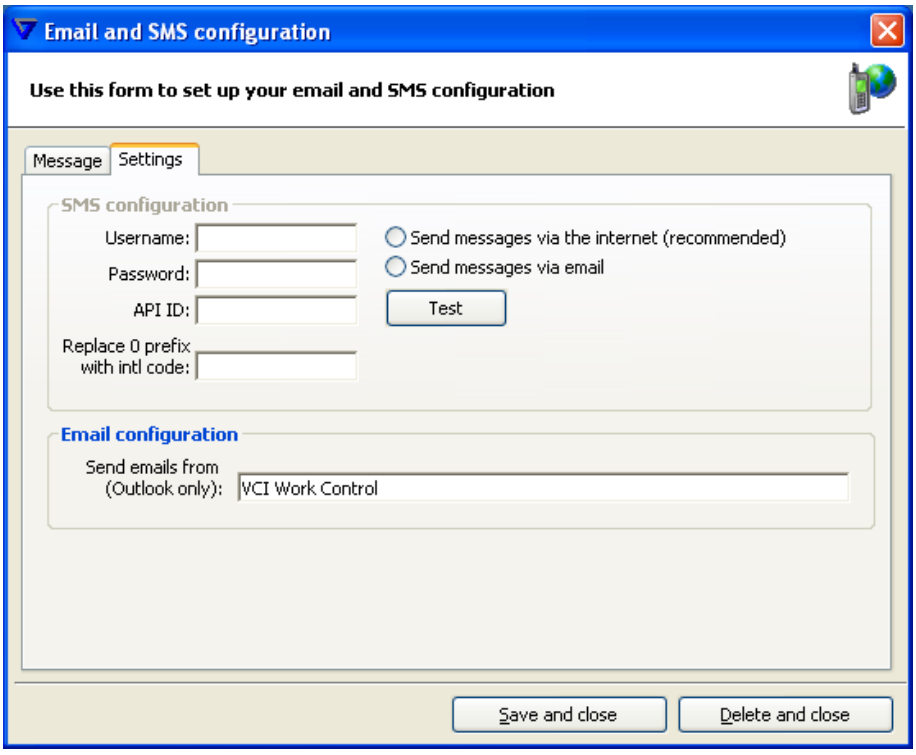


10. In the **Email configuration** area, enter the name that will appear as the sender of the email, this must be a valid email address/name from your Exchange Server or email system, in the **Send emails from** box.



All email notifications can only be sent via Microsoft outlook.

11. Click the **Message** tab.

12. When completed, an email message appears similar to the following.

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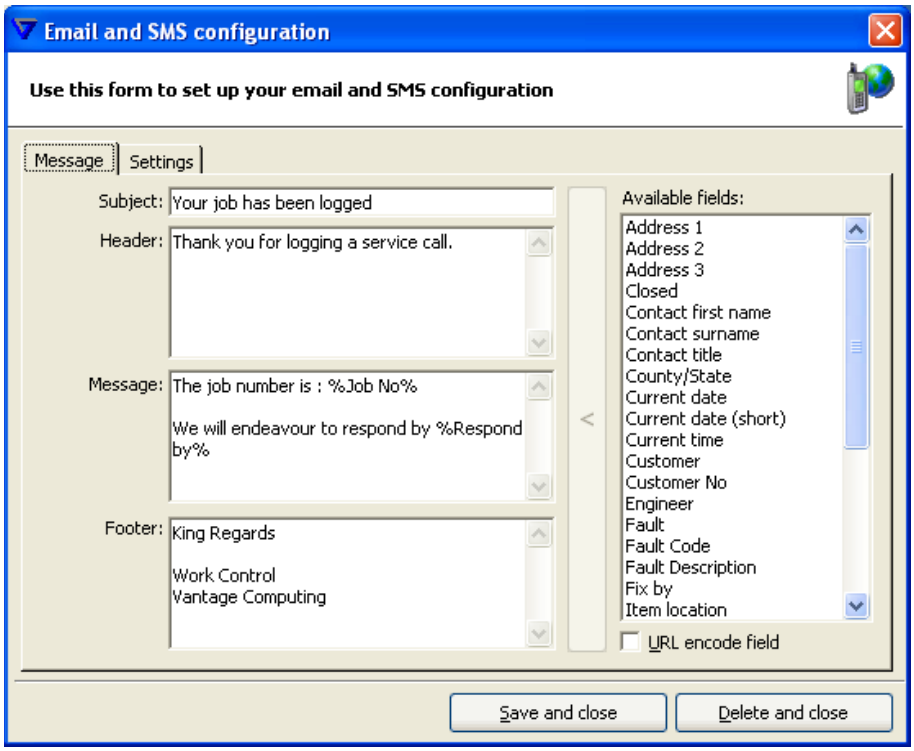

13. Click **Save and Close** to save the message or click **Delete and close** to delete the message. You are returned to the Notifications settings dialogue.

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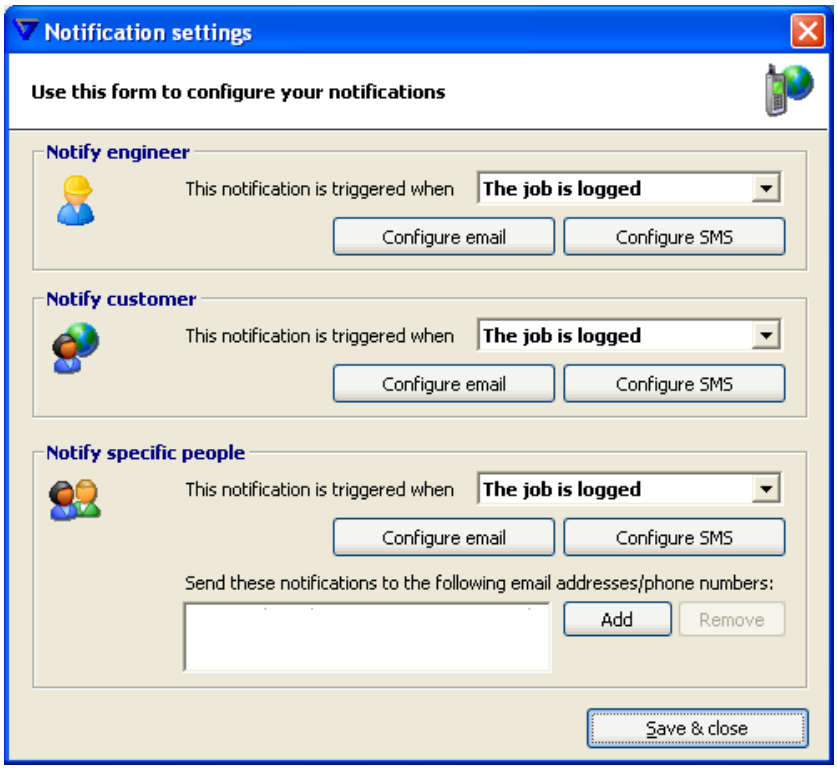
Configuring SMS notifications

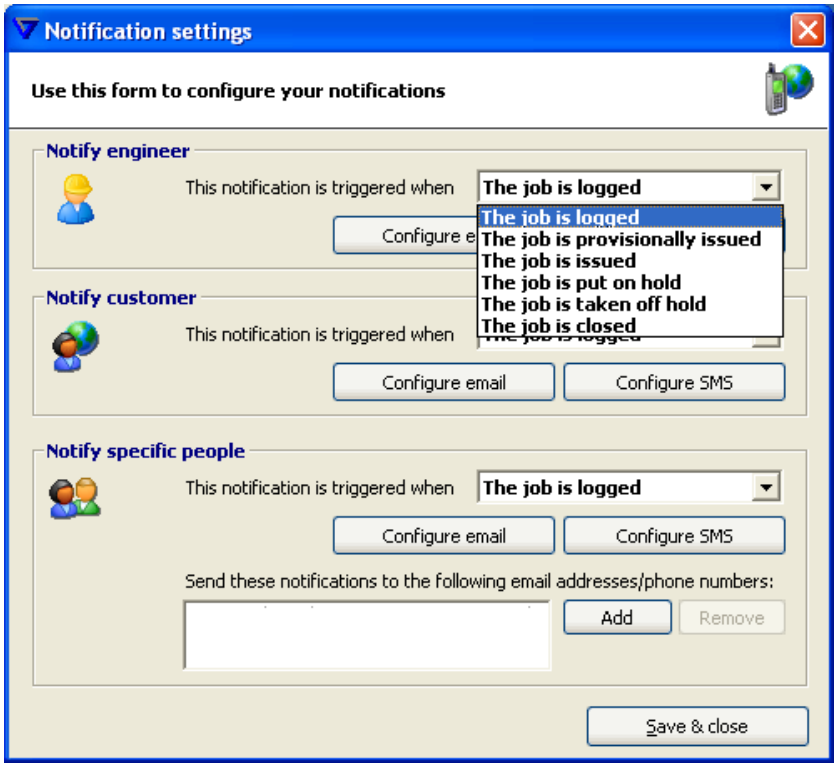
Before SMS notifications can be used, they need to be configured. Different SMS templates can be setup for the engineer, customer or specific people. The instructions below describes how to do this.

To configure SMS notifications

1. From the **Notifications settings** screen,



2. From the **This Notification is triggered when** drop down list, select the notification that will trigger the SMS.



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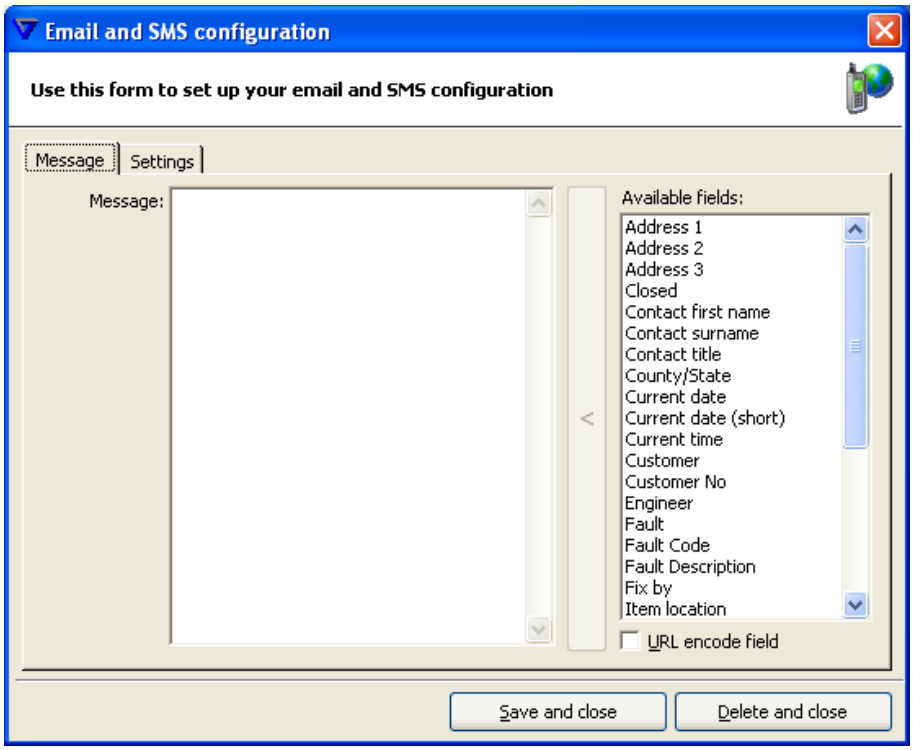
3. Click **Configure SMS** for the party to be notified. The **Email and SMS configuration** screen appears;



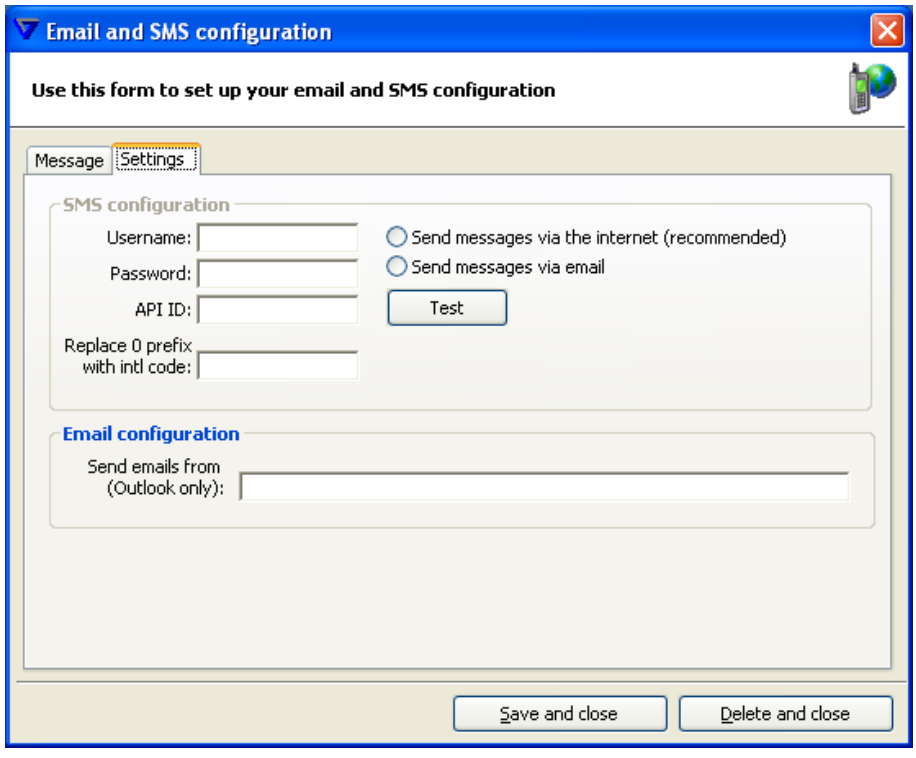
4. In the **Available fields** list, highlight the Service Accent fields that you want to appear in the SMS message, and then click the arrow key to move them to the **Message** field.

   To remove a field from **Message**, highlight and delete it as you would any text.

   Remember, as this is an SMS, keep your messages short.

5. Enable **URL encode field** to activate the ability to put a URL (or hyperlink) in the message area.

6. Click the **Settings** tab and the following is displayed;



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7. In the **User name**, **Password** and **API ID** fields, enter a valid user ID, password and API ID as advised by your support provider.

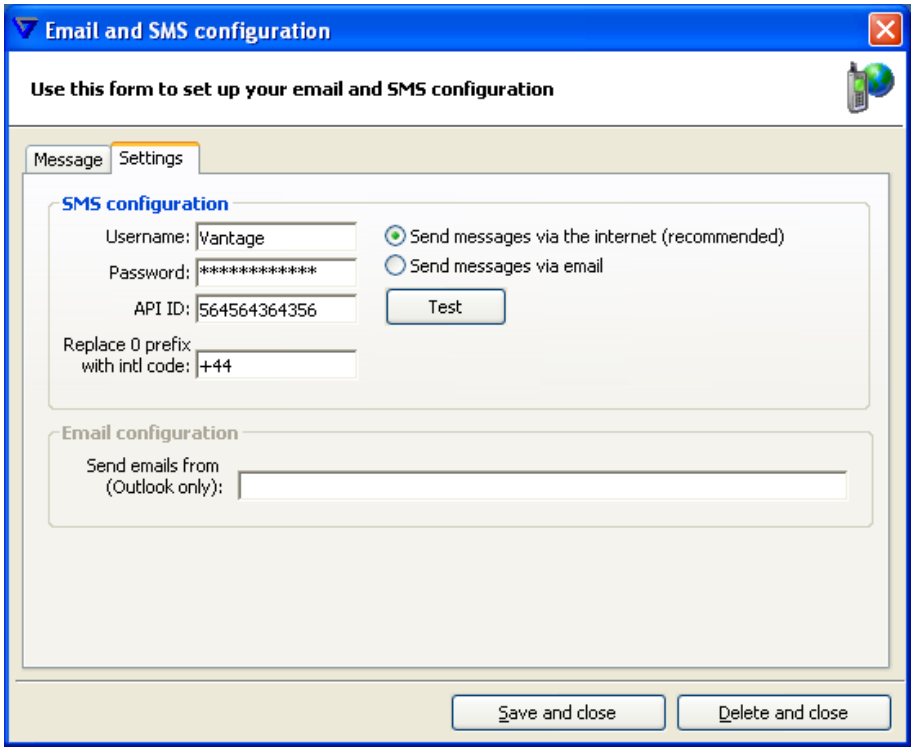
8. In the **Replace 0 prefix with intl code** box, enter the international dialling code to replace the 0 prefix that will be used when sending an SMS. For example, from the United Kingdom, the prefix 0 needs to be replaced with **+44**.

9. You can choose whether to send your SMS message to Clickatell via the internet (**Send message via the Internet**) or via email (**Send message via email**). The internet method is quicker and your message is delivered directly to Clickatell. If your workstation does not have a connection to the internet, the email method is available.

The SMS configuration details you enter here are stored and used for all your SMS notifications.

Most service providers have a limit of 160 characters for text messages. Please bear this in mind when creating SMS messages.

10. When completed, the settings for an SMS notification appear similar to the following:



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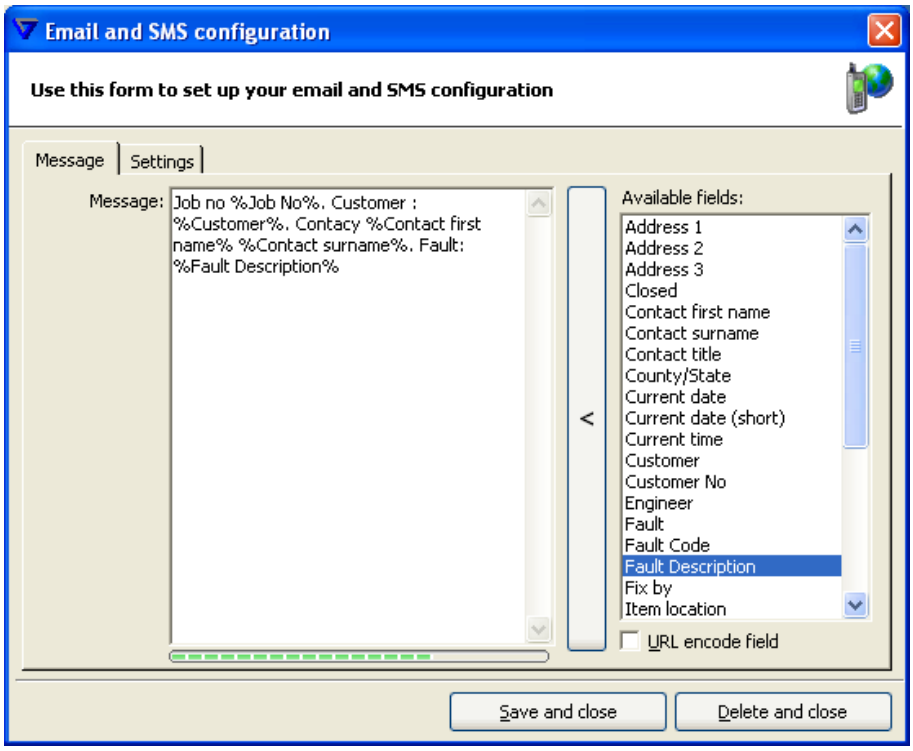
When completed, an SMS notification appears similar to the following;



11. Click **Save and Close** to save the message or click **Delete and close** to delete the message. You are returned to the Notifications settings dialogue.

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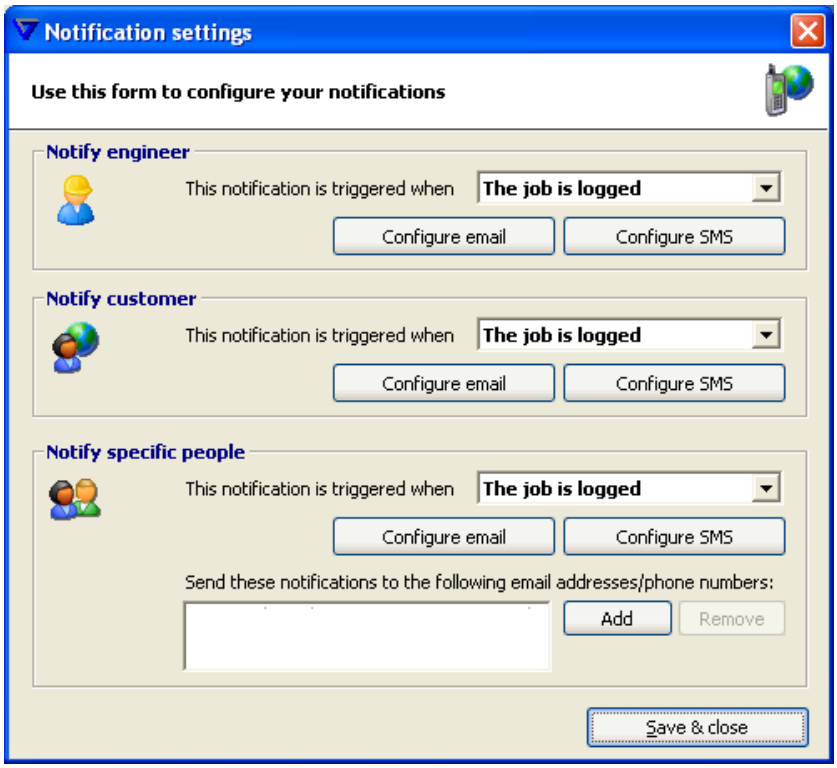
Notify specific people

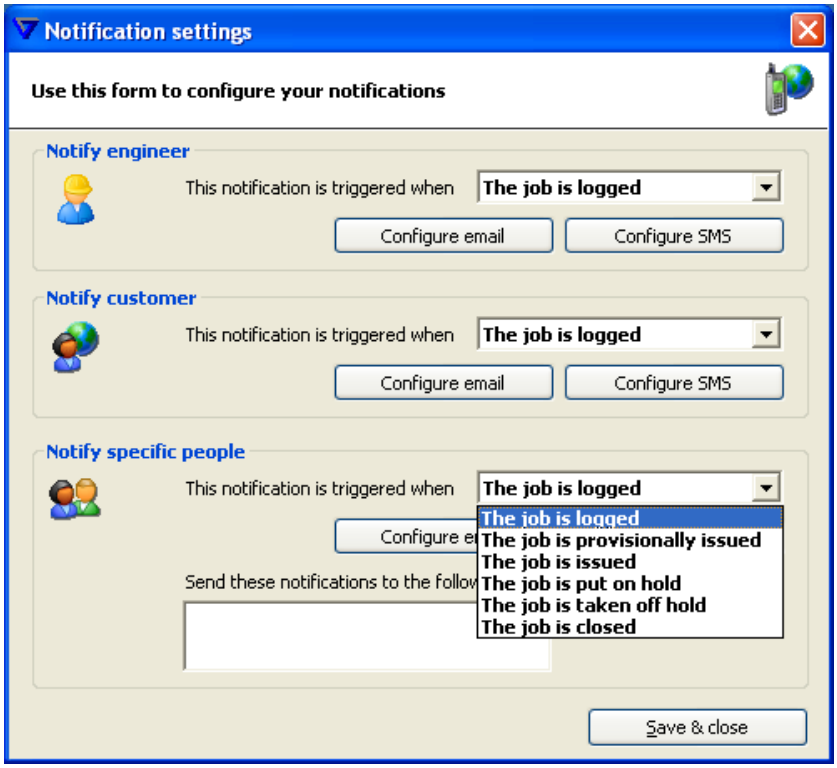
As well as notifying engineers or customers, you can also **Notify specific people**. It is the same procedure as mentioned earlier for configuring email or SMS, except that you have to add the recipients phone number or email address.

To configure notify specific people

1. From the **Notifications settings** dialogue,



2. In the **Notify specific people** section, from the **This Notification is triggered when** drop down list, select the notification that will trigger the SMS or email.



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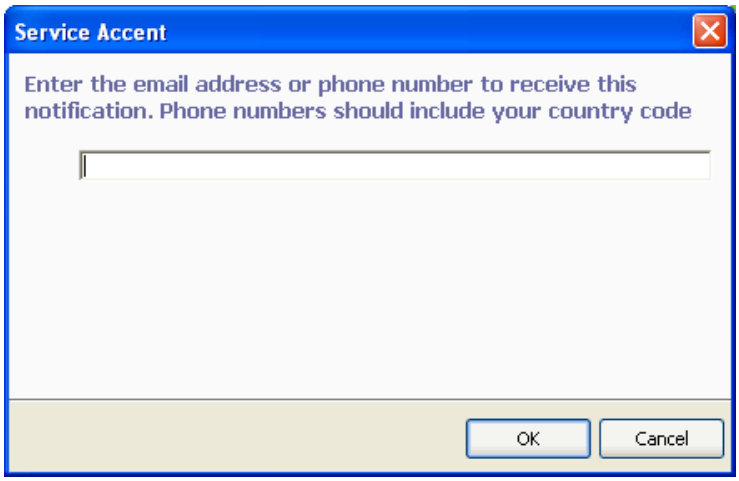
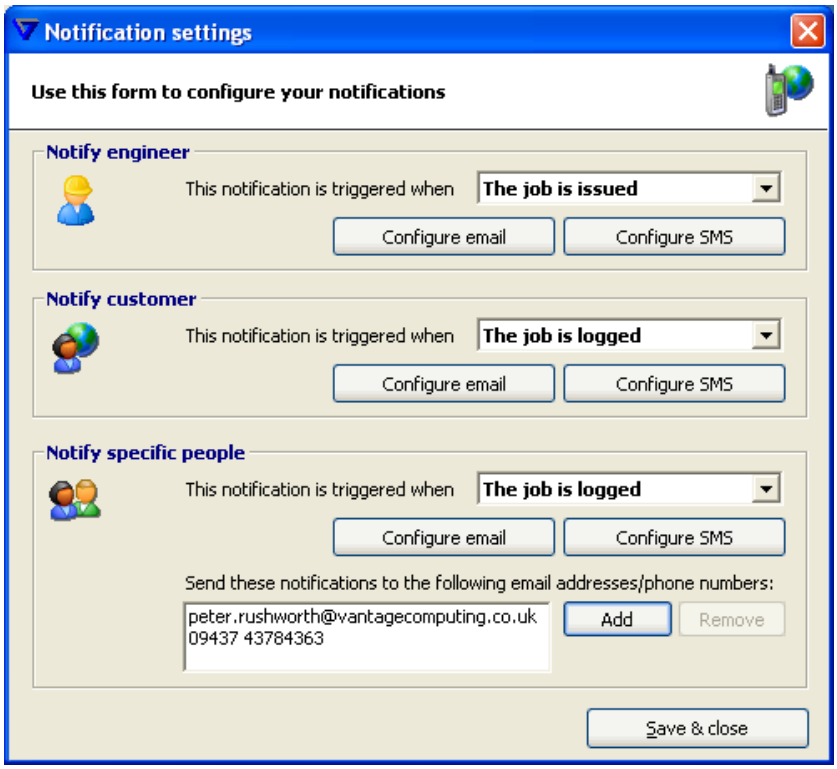
3. Click on **Add** and the following dialogue is displayed:



4. Enter the email address or phone number of the recipient. An example of a completed screen is shown,



5. Select the recipient for the Email or SMS notification from the list of specific people.

6. Click **Save & close** to save the notifications settings.

Once the **Enable automatic notifications** has been enabled, you can configure the notifications by clicking on **Admin** then **Settings** and then **Setup notifications**. This is the same as configuring the notifications through system settings.

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Using SMS and email notifications

Once you have configured SMS and email notifications, you can start using notifications from Service Accent.

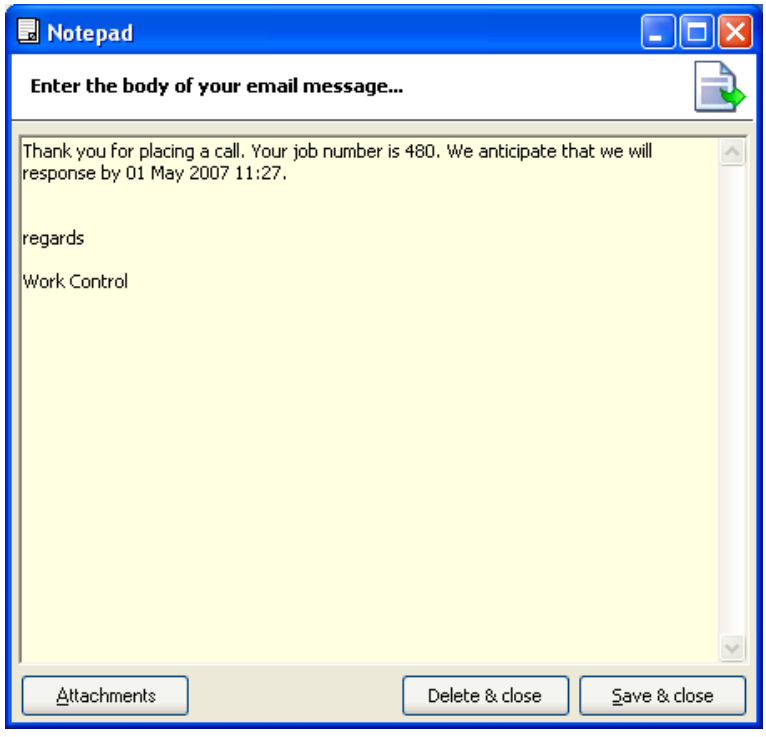
Depending on the triggers setup, various pop boxes will appear when completing certain tasks within Service Accent indicating that an email or SMS notification has been sent to the nominated person.

Email notification

If the optional Service Accent Remote Solutions modules (Customer, Engineer, Mobile or Wireless) have been licensed, an automatic email notification will be sent when a new job is logged via one of these modules. The email will be sent to the preferred field engineer on the customer record or to the preferred email engineer on the inventory record if there isn't a preferred customer engineer.

The following instructions refer to using Notifications with the main Service Accent package.

The following will appear when an email notification has been set to be triggered when a call is logged



1. The notification trigger is set to send the customer an email when the job is logged.
2. If any attachments are to be added to the email, click **Attachments**.
3. Click **Save & close** to send the email to the customer.

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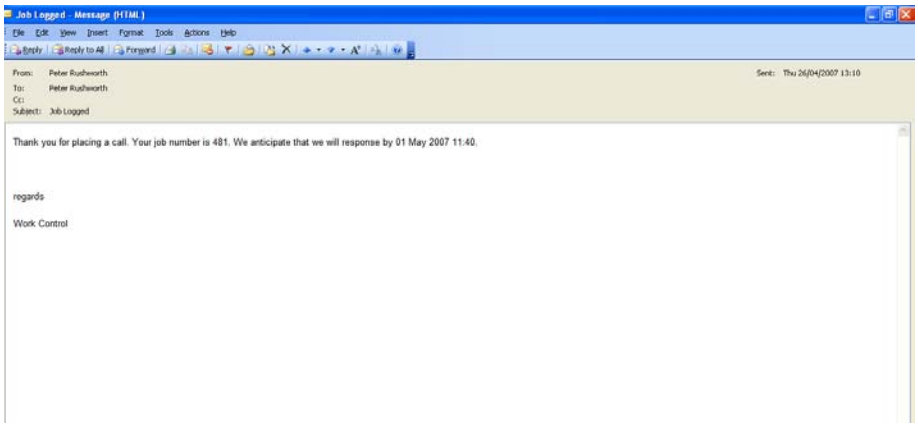
4. The following email will be received by the applicable party

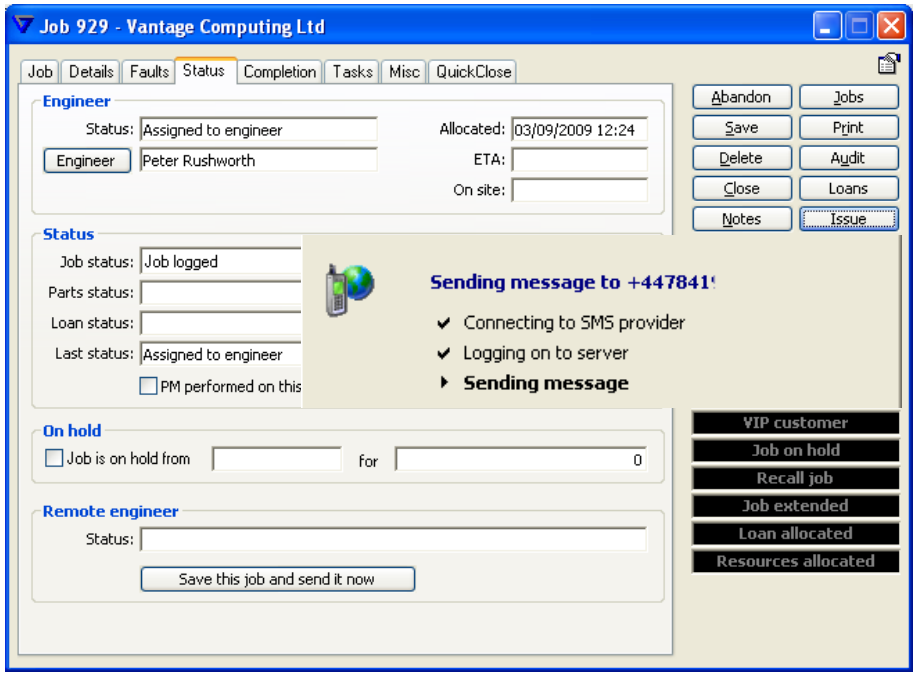


SMS notification

If the optional Service Accent Remote Solutions modules (Customer, Engineer, Mobile or Wireless) have been licensed, an automatic SMS notification will be sent when a new job is logged via one of these modules. The SMS will be sent to the preferred field engineer on the customer record or to the preferred email engineer on the inventory record if there isn't a preferred customer engineer.

The following instructions refer to using Notifications with the main Service Accent package.

The following will appear when an SMS notification has been set to be triggered when a call is fully assigned to an engineer.



1. The notification trigger is set to send the engineer an sms when the job has been fully assigned.

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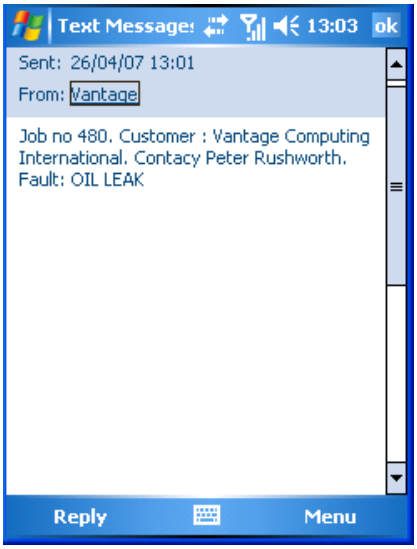
2. The engineer will receive the following text message



3. Do not attempt to reply to the SMS message, as there isn't a number associated with the sender.

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